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**PLANNING FOR PUBLIC LIBRARIES**

**A THESIS**

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**Donald Ramsey Greer**

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PLANNING FOR PUBLIC LIBRARIES

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## SUMMARY

The public library is a service agency which has as its objectives the facilitation of education, research, cultural enrichment, and recreation in the community. Its services are particularly important during this dynamic era. Society's needs for educational and informational services are greater than ever and are increasing even more rapidly than population.

The purpose of this study was to determine how the planner and library director may cooperate in the development of plans for public libraries. The study points out that the planner may make a significant contribution by providing the library director with background information and by conducting special studies.

Information for this study was obtained by an extensive search of the available literature; interviews with librarians, library consultants, public officials, and planners; and correspondence with librarians.

The planning of public libraries must begin with an analysis of library services. The planner may participate by assisting the director in evaluating the community's needs for library services and in evaluating the library program. To participate effectively, he must acquire familiarity with specific elements of the library program. The planner should be familiar with the major factors of library administration. Information about the legal basis and governmental organization of the public library are particularly important to him since he must have an understanding of the library's powers and duties and must know the formal



relationships between the library and local government. Certain aspects of library management possess implications for him as they frequently affect the overall performance of the public library.

Public library finance merits the planner's special attention. While the library's requirements for funds are not great compared to other services, most of the revenues must be obtained from local sources. State and federal governments are beginning to assist local governments with grants-in-aid. The planner may assist in the development of fiscal plans by relating social and economic conditions of the community to the needs for library service and by relating library services to other public programs in the community.

A library has specific requirements for buildings. The locational requirements of library buildings are similar to those of many retail establishments. Good library sites must be near major traffic generators and compatible neighbors. They must be accessible and within stable districts. Consideration should be given to flexibility in planning the library's physical facilities since rapid urbanization and population shifts frequently require the expansion or relocation of libraries.

## CHAPTER I

### INTRODUCTION

The public library provides a vital service to every active and progressive community. It furnishes services for the purpose of promoting education, research, cultural enrichment, and recreation. With books and other communication media representing various points of view and freely accessible, the public library is one of the most important public services for the propagation of learning and wise use of leisure.

The public library's services are particularly important at this time. The needs of society for educational information and recreational services are greater than ever before. Emphasis is being placed on learning for both vocational and social purposes. Spurred by international competition for technological achievements and by domestic, social and economic problems, advanced education programs are being promoted by every level of government, of industry, and of cultural institutions.

Population is increasing rapidly, particularly in the younger age groups. The younger segment of the population has traditionally been the chief participants in education programs and the chief users of public libraries. The need for service is greater than indicated by numerical increases because higher quality services are required. The younger generation's propensity to use libraries has expanded because the level of educational attainment of this segment of the population

has increased. Formal education is no longer sufficient to prepare citizens for lifelong endeavors, and society is increasingly aware of the need for continuing adult education.

Automation and new technology are creating new opportunities for public library development. Technological improvements displace workers and at the same time create the need for new skills. Workers, either as individuals or through adult education programs, require library services for the vocational retraining process. Executives require library services in order to stay abreast of new technology and management methods. Automation has increased leisure time and led to earlier retirement. Library services are important in creating opportunities for the wise and satisfying use of this leisure.

A study of public libraries is particularly important to planners. The library's services and facilities must be considered in overall community plans. In order to participate in the planning of libraries, the planner must have an understanding of the problems involved in providing library services. He must be familiar with public library service, administration, finance, and physical facilities.

Public library programs may be of considerable assistance to the community's planning program. The library may provide reference collections on community development for use by planning agencies. The library may also enhance community planning activities by making information on urban development and proposed improvement programs available to the citizenry.

This study was undertaken to determine how the planner and the library director may cooperate in the development of plans for public

libraries and what factors should be considered in the development of those plans. The information for this study was obtained by an extensive search of available literature; interviews with librarians, library consultants, public officials, and planners; and correspondence with librarians.

Public libraries, for the purpose of this study, are agencies which make library materials and services available to the general public and are supported by public funds. As discussed in this study, the public library refers to a system. It may be a one-unit library in a small town, a system of libraries in a large city, or a federation of libraries serving two or more political jurisdictions. Six types of libraries are discussed -- municipal, county, school district, corporation, association, and intergovernmental. Municipal libraries are operated by incorporated cities and are controlled by the cities' legislative bodies or by appointed boards. County and school district libraries are similarly supported and controlled by their respective legislative bodies. Corporation and association libraries are similar to the municipal, county, and school district agencies in that they provide free services to the general public and obtain part of their financial support from public funds. However, corporation and association libraries are controlled privately, either by a chartered board of directors or by the membership of an association. Intergovernmental libraries are systems which serve more than one political jurisdiction.

Chapter II describes public library service including the objectives the library hopes to accomplish and the type of studies needed to evaluate and develop plans for library services. Chapter III discusses

administration of public libraries emphasizing the factors with which the planner should be particularly concerned such as the legal basis, governmental organization, and management of public libraries. Chapter IV presents an analysis of public library finance including expenditures, sources of revenue, and fiscal planning. Chapter V describes the important factors concerning public library buildings such as the location requirements, building requirements and suggested planning activities.

## CHAPTER II

### PUBLIC LIBRARY SERVICE

The planning program for public libraries must begin with an analysis of public library services. Administration, financing, and physical requirements are auxiliary functions and are important only as methods of achieving desirable public library services.

This chapter describes the objectives of public library service, services provided by public libraries, standards for public library service, and planning for public library service.

#### Objectives of Public Library Service

The objectives of the public library are the goals it seeks to accomplish. The American Library Association has expressed very broad objectives for library service. Among the most important are:

- To facilitate informal self-education of all people in the community

- To enrich and further develop the subjects on which individuals are undertaking formal education

- To meet the informational needs of all

- To support the educational, civic, and cultural activities of groups and organizations

- To encourage wholesome recreation and constructive use of leisure time (1).

Public library service is an instrument of self-education for individuals. It attempts to serve persons of various age groups and levels of educational attainment. It assists individuals in keeping abreast of progress in various fields of knowledge. As a public service it supplements the press, radio, television, and other mass media by

making reliable information available on a variety of subjects and points of view. Hence; the public library is a center for continuing education.

Another objective of public library service is to support the activities of formal educational institutions in the community. While academic institutions develop their own library collections, the public library frequently acts as a reinforcing agency, emphasizing support of the primary and secondary school programs.

The public library functions as an information center. Service is provided to meet the frequent informational and research needs of the community. The library provides answers to inquiries on general topics and also those on subjects of special importance in the community such as agriculture, business, and technology.

The support of group programs is an objective of public library service. Many people are motivated to use the library's resources only through group activity. In order to extend the benefits of library service to more people, assistance to organizations is given in the form of materials and special services. Also the public library initiates group activities within the framework of its own program.

An increasingly important objective of public library service is to support recreational activities. Service to individuals and groups is provided to encourage wise and satisfying use of leisure through reading. Also the public library contributes to the development of new interests in recreational activities outside the library.

Interpretation of the objectives that the public library hopes to accomplish is mainly the responsibility of the director (2). His

experience and broad academic background enable him to understand the community's needs in terms of library service. Library boards or other officials legally responsible for the library are laymen with respect to library programs. Therefore, they must depend on the director to translate broad objectives into library programs appropriate for the community's needs.

### Services Provided by Public Libraries

The services offered by the public library provide direct means of achieving expressed objectives. These services are organized in numerous ways in different libraries. However, for the purpose of this paper they are grouped into the following categories: circulation services; reference services; advisory services; and special services.

#### Circulation Services

The circulation function of the public library is concerned with the lending of materials for consecutive reading. In the early public libraries it was the only function and it still remains the most important in terms of the number of users, volume of materials, and number of library personnel.

Books are the principal materials supplied by the public library's circulation service. The lending of other materials such as pamphlets, maps, phonograph records, films, slides, microfilm and prints is becoming increasingly popular but does not rival the lending of books to any significant degree. Almost 500 million books were borrowed in 1955 compared to less than 10 million for all other materials combined (3).

The primary goal in developing a book collection is to provide



quality books. Today, paper-back books, magazines, television, and motion pictures supply a major portion of the readers' needs for light fiction. Also, some libraries find that the provision of light fiction does not lead users to read more worthwhile works to any extent. As a rule of thumb, 55 per cent non-fiction and 45 per cent quality fiction is considered desirable, but local conditions are the deciding factors (4).

Users of the public library participate heavily in its circulation services. Two-thirds to three-fourths of the public library's patrons use the circulation service compared to one-fourth to one-third for the reference function (5). Among the most frequent borrowers of library materials are professional and managerial people, students, housewives, and children.

#### Reference Services

Reference services are concerned more with the provision of factual information than with material for consecutive reading. This function of the public library provides three major types of service. These include: (a) the answering of fact-finding questions; (b) the answering of material-finding questions; and (c) the teaching of methods and techniques for finding information.

A large amount of reference service is the answering of fact-finding questions (7). These range from the very simple, such as the ones answerable through the use of a directory, to the more difficult requiring in excess of a half-hour and employing numerous sources. The answering of fact-finding questions over the telephone is a rapidly increasing service. Approximately 94 per cent of all public libraries

provide this service . The Cleveland and Detroit public libraries provide exceptional service in this field; Cleveland has 25 trunklines and Detroit has 18. Telephone use is especially effective in metropolitan areas where transportation and parking make personal trips to the library difficult and time consuming (8).

Answering material-finding questions is equally important but involves a fewer number of users. This aspect of reference service includes the recommending of material sources and in some cases the preparation of bibliographies and abstracts for inquirers. Locating materials outside the library is also part of this type of service since the materials sought are not always available within the library. In this case some materials may be obtained through inter-library loans or by referring the inquirer to an outside source such as a private business collection, government office library, university library, or other special reference libraries. Although many special libraries are operated by private agencies, use of their resources by outsiders is often encouraged as part of the parent company's public relations program, especially if the inquirer has been referred by other librarians (9).

The most effective instructional service on how to use public library reference resources is done through co-operative efforts with groups outside the library. Cooperating with programs in local schools and colleges is essential. Work with adult education groups is also important. Finally, individual guidance to users in the library is necessary for a search of the less obvious reference information (10).

The identifiable groups that use reference services most frequently

are high school students, club women, college students, business men, factory workers, and other librarians. Other less frequent users are artists, city officials, clergy, lawyers, housewives, and writers. People who have well defined informational needs related to their work are more likely to use the public library's reference service than is the average citizen (11).

High school and college students are the predominant users of public library reference services. New methods of teaching with emphasis on term papers and independent study as well as rapidly increasing enrollments are the principal factors contributing to heavy student use. Use of reference services by college students is actually greater than by high school students in many of the larger cities (12). In large, metropolitan libraries, use of reference services by college students is particularly high on weekends and during vacations (13).

Practically every public library provides some type of reference service. The smaller independent libraries usually provide encyclopedias, dictionaries, almanacs, and similar works but seldom have adequate staff to help inquirers obtain more than minimal benefits from these sources. Medium size libraries serving populations of 25,000 to 100,000 are likely to have more complete reference collections and almost half have full-time reference staff members (14). For the most part, highly developed reference services are found only in large library systems, serving populations of 100,000 or more.

There are two major factors that present opportunities for increasing the effectiveness of public library reference services. They are the development of regional reference centers and new technological

improvements.

Regional reference centers provide information and materials that are beyond the capacity of the local public library (15). For the most part, services are requested and received through the local library. However, in some systems such as the San Joaquin Valley Information Service (California) (16), the information exchange is occasionally directly with the individual inquirer either by mail or by telephone.

Regional reference service is still in the early stages of development. There are no established patterns of development except that assistance by state governments is essential in both administrative and financial support. Some of the more important programs are New York State's Regional Reference and Research Library (17), Pennsylvania's regional program (18), New Hampshire's state-wide program (19), and North Carolina's Special Interlibrary Loan Service (20).

Technological improvements that are being developed will greatly enhance the fact-finding and information-finding function of the public library. Through the use of information storage and retrieval systems it is possible to classify material not only by whole publications but also by chapters or smaller portions. Such systems can scan a large volume of material very rapidly and print out a bibliography of the most important sources of information (21). These systems are in the early stages of development and are only being considered by a few of the very large public libraries (22).

Another important development is the use of special communications equipment to increase the effectiveness of inter-library loans. Racine (Wisconsin) uses teletype to send and receive information to and from

neighboring libraries (23). A similar system has been proposed for the San Francisco Bay Area (24).

### Advisory Services

The public library furnishes three major types of advisory services. These are: (a) direct advice to the inquirer by professional staff members; (b) indirect guidance through booklists, displays, and publicity; and (c) instructional help in reading and in the use of techniques for finding material.

Direct advice to users is accomplished by staff members who like and understand people and who possess an extensive knowledge of books. The goal of such advice is to suggest the book or books most appropriate for the purposes of a given reader (25). In many public libraries, the most competent and personable staff members are chosen for this function (26).

Indirect guidance through booklists and publicity reaches a larger audience than the more personal, direct approach. Specially prepared booklists are a helpful and timesaving service to readers. Short lists of 10 to 25 publications on current events or special subjects are sometimes distributed by direct mail as well as made available in the library (27). Some libraries offer rapid-reading training and most provide for group discussion programs (28). Other methods of suggesting and encouraging reading include displays, exhibits, radio and television programs, and newspaper articles.

### Special Services

Recognizing the unique needs of certain age groups and their particular interest in certain subjects, many public libraries have

developed special services. The most frequently cited are services for children and young adults and programs on special subjects such as business and industry, art and music, and local history. Other less common special programs include literature and language, sociology and religion, fine arts and fashion, and municipal reference.

Service for children is one of the oldest and most highly developed of the public library's special functions. This service is quite common in American public libraries, even in branches and small independent units. The purpose of services for children is to encourage the development of informal reading habits and to teach young people how to use library resources. This involves individual reader guidance in selecting books for consecutive reading and the use of reference materials. It also involves group activities such as story telling. Finally, assistance to groups outside the library, such as scouts and Sunday schools, is important as a community service (29). As in other specialized functions of the public library, services for children require the work of special personnel. Children's librarians have training and experience in child psychology, children's literature, and teaching methods (30).

Service for young adults is oriented to the 14 to 18 years age group. Service for this group is considered an extension of service for adults rather than part of service for children. The major factor contributing to the success of this service is the ability of the librarian in charge to understand teenagers. In this respect the personality of the librarian is fully as important as other qualities (31). A major factor in services for young adults is cooperative work with other youth

serving agencies outside the library. Distinctive aspects of the program involve working with the school librarians in order to avoid duplication of materials, assisting the teachers with their assignment of research papers, and assisting public recreation personnel in their programs utilizing reading material for young adults.

The special services to business and industry are found primarily in the larger central libraries. Such services are given a number of names including science and technology, business and labor, sociology and business, and business and economics. Service to business and industry is primarily a reference function, answering fact-finding or material-finding questions. This includes service by telephone and mail. It provides information on management, marketing, investments, and scientific developments. Investors use the investment indexes, salesmen use the directories, businessmen use materials on management and processing, and advertising and marketing firms use a variety of the reference materials provided.

The business and industry division of the public library deals with information of interest to local planning agencies and other public offices. Such information includes material on economic trends, population characteristics, industrial development, and a variety of subjects related to city planning and local government. A few public libraries provide similar service through a special municipal reference department. But in the absence of such service, the business and industry department is the logical source for reference materials needed by local government officials.

Art and music are often combined as one subject and are sometimes

labeled fine arts. The services furnished involve reader guidance in the art and music fields and the lending of prints, musical scores, and related materials. In some cases audio-visual services are provided as part of the art and music function (32).

Local history departments are found in numerous public libraries. They collect and make available materials of historical interest to their areas. Such materials include maps, reports, biographical sketches, newspaper clippings, and photographs. Such services are of particular interest to students and local historical societies (33).

#### Standards for Public Library Service

In developing plans for public library service it is necessary to evaluate existing and proposed programs in light of some system of measurement. As in the evaluation of other public services, such measurement must be qualitative as well as quantitative.

#### Qualitative Standards

The American Library Association developed and published in 1956, Public Library Service: A Guide to Evaluation, With Minimum Standards. In contrast to other works by the Association (34), this publication deals almost entirely with qualitative standards. These standards are similar to policy statements and reflect the library profession's recommendations on what the public library should do in the community and how the task should be performed. Although these standards are considered minimum requirements by the Association, they might more appropriately be considered as guides by laymen. Some examples of qualitative standards are the following:



1. Every individual should have free library service available in his local community.
2. Every individual should also have access through his local outlet to the full range of modern library facilities provided by regional, state, and Federal library agencies.
3. The community library should have sufficient resources to enable it to provide the most frequently requested material from its collection.
4. The community library should be as easy to reach and to use as the local shopping center (35).

The value of these particular standards to the planner and other local government officials is as a guide for the evaluation of local objectives and programs. They are more effective than quantitative standards since they indicate in general terms what might be expected of the library with respect to service programs, materials, and personnel.

State library agencies have been active in the development of standards for local public libraries during the past ten years. Most of the states have developed their own standards. A few states recommend Public Library Service as a guide to local libraries. Although not a common practice, some states use all or part of their standards as prerequisites for grants-in-aid to local libraries (36).

#### Quantitative Standards

Quantitative standards are important because they are symptomatic of quality and are relatively easy to compare statistically. Public libraries keep and report elaborate statistical data on circulation, number of volumes added, reference questions, and the like. Most library surveys and reports deal heavily with these types of data.

The American Library Association published quantitative standards in Cost of Public Library Service in 1956, as a supplement to Public

Library Service, and revised editions were published in 1959 and 1963.

Although these standards are presented as minimum requirements for adequate service, they appear arbitrary to the layman. For example, in 1960 only 14.0 per cent of the libraries serving 35,000 to 49,999 people expended the recommended minimum budget of \$100,000 and only 7.5 per cent of the units serving 50,000 to 99,999 people expended the recommended minimum of \$250,000 (37).

The planner should have a clear understanding of what the published standards mean and use them sparingly as representative of minimum service requirements. A more realistic approach in evaluating library services is to compare data such as per capita expenditures, number of books, and registrations of the local library with comparable units within the region and with national averages and national standards.

#### Planning for Public Library Services

The library director is the chief planner of public library services. However, the city planner has a responsibility to assist in the development of all public service programs and the planning agency's resources can be of significant value to the library's planning program. In developing both short and long range plans, the planning agency's resources can be effective in evaluating the community's needs for library service and evaluating the public library's program.

#### Evaluating the Community's Needs for Service

Writers on library administration encourage librarians to develop and maintain an understanding of their community. They stress the importance of population characteristics, social and economic trends,

and cooperation with programs outside the library (38). The local planning agency can promote this understanding by making available needed background information and by conducting special studies that are beyond the time or talent capabilities of the library staff.

Background Information. Local planning agencies develop and often publish background studies on population, labor force and employment, and economic trends. Such studies are important to the library director. In developing his program he needs to know the trends in the characteristics of population, particularly trends in age distribution, level of education, personal income, and occupation categories. Age distribution is particularly important in the planning of services for children, young adults and senior citizens. Levels of education and personal income are closely related to adult circulation services and trends in occupation categories are important to both circulation and special subject services. Distribution of population by geographic areas is important in the planning of services in branches and on bookmobile routes.

In labor force and employment studies the library director is interested in where major users of the library, such as professional and managerial workers, are employed. Skill shortages are of greater interest to other adult education institutions but the public library occasionally becomes involved in vocational programs. Trends in the effect of automation on leisure time and early retirement in the community are important in the planning of recreation oriented services of the public library.

Special Studies. The active participation of planning agencies

in special library studies has occurred in Nashville (39), Seattle (40), and Toledo (41). However, in these cities the principal consideration was the location of branch libraries. A more comprehensive library study was undertaken by the Metropolitan Planning Commission of Knoxville and Knox County (42). In this case the Planning Commission prepared information on community conditions and used consultants to evaluate the needs for library service and to develop a proposed program.

Another important special study that planners might undertake is the interpretation of the effects of major public and private urban development program on library service. The relocation of families as a result of urban renewal or highway programs will surely affect the needs for library service. The development of higher education institutions or improvement of transportation facilities are other examples of programs that will affect the need for library services.

#### Evaluating the Library Program

In the interest of keeping abreast of needs of the community and developing better services, the library's program should be analyzed thoroughly and frequently. Continual evaluation of the public library's program is a principal concern of the library director.

Studies of library programs can be accomplished in three ways. Library consultants can be called in to survey the library's program and make recommendations for improvements. This approach is very effective in obtaining objective opinions but is probably too expensive to be done frequently. A second method is to use local personnel. The library staff, with the assistance of public officials outside the library, such as finance officers, personnel officers, and city planners, can conduct

studies of the library's program frequently and at little direct cost. Another value of this approach is that staff members and local officials become closely involved in the library's program. A third method of evaluating the library's program is to use both local personnel and consultants. In this case consultants are brought in only to study special problems and offer guidance to the locally conducted studies.

The evaluation of the public library's program involves a study of existing services and a study of library use.

Study of Existing Services. A practical method of analyzing the quality of library services is to compare the local library's activities with those of similar libraries, with national averages, and with state or national standards. The libraries selected for comparison should be in communities of similar size and with similar economic and social characteristics. They should include several libraries from within the region as well as units in other regions that are known to have outstanding services.

Data on the library's staff, book collection, circulation services, references services, and registration are good indicators of the quality of library services. Reasonably current data for nearly all public libraries are published by the U. S. Office of Education (43). Most state library agencies also publish data annually.

Only the director or a library consultant can evaluate the adequacy and performance of the staff. However, a comparison of the number of professional staff members in the local library with the number in similar libraries is an indication of relative performance. Other comparative data include the ratio of circulation to staff, the budget for

salaries, and the ratio of salaries to the total budget.

In analyzing the library's book collection, the important comparative data include the total number of volumes, the number of books added annually, the number of titles, the total book budget, and the ratio of non-fiction to fiction books. A more precise measurement of quality is a comparison of the number of titles owned by the library with the number of titles listed in standard indexes (44).

Circulation is one of the most universal units for measuring library service; however, to represent the quality of service more accurately, circulation figures should be broken down into adult fiction, juvenile fiction, adult non-fiction, and juvenile non-fiction. Another important comparison is the ratio of the total circulation budget to the number of volumes circulated. This ratio is an indication of the performance of the library's circulation function.

The most common method of measuring reference service is to compare the annual number of reference questions. Results of this comparison are often misleading because various libraries define reference questions differently. When data are available a comparison of the number of reference librarians is a reasonably accurate measure of the availability of reference services.

The total number of registered borrowers is often used as a measure of the proportion of the community's population that uses the library. These results can be misleading because registration figures are often cumulative over a period of years.

Study of Library Use. Questionnaires are the most common method of analyzing library use. The purpose of the questionnaire is to survey

a sample of the community's population to determine:

1. Which segments of the population, classified by age, occupation, economic status, and other characteristics use the library more or less frequently?
2. For what purpose do these groups use the library?
3. To what extent do the present library service meet the needs of these various groups?
4. Why do not more people use the library?
5. How effective is the library's public relations program?

Surveys of this type are relatively simple and easy to conduct. Some very good questionnaires have been developed which could be used in practically any community with minor revisions (45). Although this type of survey may require expert analysis it does not require special interviewing techniques and it can be conducted by community organizations.

## CHAPTER III

### ADMINISTRATION OF PUBLIC LIBRARIES

Administration is getting things done through people. In public library development this means working with people outside the library as well as within. As in all public services, consideration must be given to elected and appointed officials and co-equal public departments as well as to the details of internal operation.

The director is the chief administrator of the public library. He is responsible for the execution of policies adopted by elected or appointed officials and the planning and initiation of new activities. In carrying out his program the director must rely upon assistance from other local government officials such as personnel officers, planners, and finance officers. The effectiveness of the public library will be influenced, to a large degree, by how well these public officials understand library administration.

This chapter deals with the factors concerning public library administration with which planners and other local government officials outside of the library should be familiar. The factors are: the legal basis for public libraries, governmental organization for public libraries, and public library management. Administrative activities related to library finance are discussed in Chapter IV.

#### Legal Basis for Public Libraries

The legal structure on which the public libraries of the United



States are founded is very complex, involving various types of legislation for the numerous classifications of public libraries. The power to operate and expend funds for public libraries is delegated by the states in the form of general enabling legislation, special acts, and charters. The various types of public libraries -- municipal, county, intergovernmental, school district, corporation and association -- are empowered by one or more of these three forms of legislation.

Each state has enacted general enabling legislation authorizing the establishment and maintenance of one or more of the various types of public libraries. These general laws are in the form of separate statutes or are included in the states' general education laws. The content of these general laws varies considerably from state to state. Most of the state legislation includes detailed requirements for the organization, administration, and financing of local libraries. For example, the general library laws of Ohio, which are among the most comprehensive library laws in the United States, provide that municipalities, townships, school districts, counties, and groups of counties may establish public libraries. Local governments which elect to establish a public library must appoint a board of trustees to assume responsibility for the operation of the library. The legislation specifies the powers and duties of the board such as the authority to expend funds for the maintenance and improvement of the library; to make and publish regulations regarding the use of the library; to establish main, branch, and mobile libraries; to provide service outside the library's taxing district; to enter into contracts for library service; to own, lease, and sell property; to accept gifts; to set up building funds; and to

appoint all employees of the library. The law also establishes procedures for adopting by-laws, for buying or selling real estate, and for executing contracts, and requires the preparation and submission of annual reports. The Ohio library laws establish the maximum tax rate which cities, counties and other appropriating authorities may levy for public libraries. The appropriating authorities may levy any amount within the specified maximum rate. The library laws of Ohio also require that all library directors be certified by a state board of examiners (46).

With a few exceptions most of the states' general library laws have provisions similar to those of the Ohio laws. A few states, however, permit boards of education to operate public libraries without appointing a separate library board. In these cases the policy-making body and appropriating body are the same. A few states, such as California and Montana, permit county legislative bodies to operate public libraries as departments. Also the general laws of a few southern states allow more latitude regarding administrative activities. An extreme example is the Texas law which permits municipalities to operate public libraries without restrictions concerning administrative organization. In these cases many of the public libraries' specific powers and duties are spelled out in city and county ordinances and resolutions.

There are other general state laws which may have direct bearing on public libraries. Several states have enacted civil service laws which affect the selection and tenure of library employees. Legislation which regulates the way in which cities and counties control and

account for public funds may place restrictions upon the public libraries' operations. Also, central purchasing laws often place restrictions on the acquisition of materials by the public library (47).

Special legislative acts usually apply to specific political jurisdictions of the state and make authorizations not covered by other state laws. Special acts establishing public libraries were common during the early stages of the public library's development. This type of legislation was used to provide for special conditions such as the handling of endowments. Special acts are the legal basis for the public libraries of New York, Boston, Detroit, and Buffalo and many smaller institutions. However, special legislation for public libraries has seldom been used in recent years (48).

In some states, municipalities are empowered to operate public libraries by their charters. In most municipal charters, the provisions concerning public libraries are very similar to the provisions of the state's general library laws except that numerous charters permit cities to operate public libraries as departments. Some charters do not include specific provisions but state that municipal libraries are subject to general enabling legislation. When charters include specific provisions that are in conflict with general state laws, the charter provisions are generally held invalid (49).

Corporate charters are the legal basis for a number of corporation and association libraries. Corporation library charters usually specify by name the members of the library boards and provide for perpetual succession. Corporation libraries are independent of local governments. The boards of corporation libraries are authorized to

regulate the operation of the libraries, to select personnel, to purchase materials, to receive gifts, to own property, to sue and be sued, and to participate in other enumerated activities. Examples of corporation libraries include the Providence (Rhode Island) and Portland (Maine) libraries. Association libraries have essentially the same legal basis and powers as the corporation libraries; however, the association libraries have large paid memberships which elect the boards of directors. Examples are the Portland (Oregon) and Hartford (Connecticut) Library Associations (50).

#### Governmental Organization for Public Libraries

In order to participate in the planning of public libraries the planner should have an understanding of the governmental organization for public libraries. The planner must know who is responsible for library policy and who is charged with administrative duties. He must also know the relationships between the library and other local governments.

Various types of governmental organization have advantages in particular situations and no single form is appropriate in all areas. The crucial factors in accomplishing the administrative and policy-making functions of the public library are the administrative ability of the library director and the competence of local government. Expert direction by a proficient librarian is essential to the development of active and progressive programs. The leaders of competent and well organized local governments usually recognize the need for expert direction of the library and make whatever arrangements are needed to attract and retain a good director. Also good library directors are much more likely to

accept a position in a community where local government is well organized and favorably inclined toward the development of good public services.

Public libraries may be organized as separate agencies under administrative boards, as departments of city and county government, and as intergovernmental library agencies.

#### Administrative Boards

The purpose of organizing the public library under an administrative board is to place the policy-making function of the public library with an autonomous body. The board is given a relatively free hand in determining what the library will do and how the job will be done. The membership of most boards is appointed by officials of local governments. Local governments provide most of the libraries' financial support. Hence, administrative library boards, although given broad powers by law, are usually subject to indirect control by local governments.

In the early stages of the public library's development, administrative boards played an important part in the promotion and guidance of public libraries. Separate boards were deemed necessary to handle gifts and endowments. Also, local governments were frequently incompetent and separate boards served as a buffer between the operation of the library and local politics.

Today, a great majority of the public libraries are still governed by administrative boards. The International City Managers' Association found, in 1962, that 87 per cent of 756 municipal libraries serving populations of 10,000 or more were controlled by administrative boards (51). Complete information is not available on the proportion of

county and regional libraries governed by administrative boards. Most states, however, require county and regional libraries to be organized under the jurisdiction of administrative boards.

Administrative boards have long been a point of controversy among writers on library administration. However, many writers have found that boards are effective and necessary in many communities because control of the library by an autonomous body removes the operation of the library from local politics, provides continuity of policy, permits lay control of the library administration, and introduces the judgment of the community's professional people into library affairs (52).

Other writers contend that separate control by administrative boards has contributed to the ineffectiveness of many public libraries (53). Many library boards are overly conservative and are reluctant to support active programs especially if the programs require additional revenues. Advanced age and long tenure of many board members tend to promote the status quo. The "Connecticut Library Survey" found many more board members over 70 than under 40 years of age (54). Twenty years tenure is not uncommon for library board members. Some library board members tend to become overly concerned with details of management such as personnel administration or purchasing. Also board memberships have been found to contain high concentrations of attorneys and businessmen and are seldom representative of other occupational groups such as education, engineering, public administration and labor.

The significance of these arguments is not that administrative boards should be employed or abolished in all communities. Boards have proven effective in numerous communities. Many of the disadvantages of

boards discussed above may be corrected without complete abolition since many of the criticisms refer to the personal characteristics of board members. Appointing authorities could correct many of these deficiencies through the filling of vacancies. Some suggested policies for the appointment of board members are: select persons who are progressive leaders in the community who are willing to promote active programs; make it a point to include persons from various occupational interests such as education, labor, public administration, agriculture, business, and law (55); restrict appointments to persons under 65 and preferably under 45 years of age; and limit tenure to two terms (56).

In smaller communities the number of persons with these qualifications who are willing to participate as board members is usually limited. This limitation may be sufficient justification to consider abolishing the administrative board form of library government in some communities.

#### Departments of Municipalities and Counties

Some public libraries are organized as departments of local governments. Most department-type libraries are operated by counties and council-manager cities. The responsibility for library policy is retained by the local legislative body. Administrative responsibility for the library is usually given to the local governing body's chief executive or, in the case of the commission form of local government, to a commissioner. Considerable administrative authority is frequently delegated to the library director. For example the directors of county libraries in California are given, by law, jurisdiction over the selection of library personnel. The director is usually given a free hand in

the direction of programs, supervision of personnel, and selection of library materials. In some department-type libraries the director is assisted in the planning of programs and the framing of regulations for the use of the library by an advisory board (57).

The proportion of public libraries organized as departments of city and county governments is small. In 1962, the International City Managers' Association surveyed 756 cities with populations of 10,000 or more, that operated public libraries. Only 96 or 13 per cent of the total had public libraries operated as city departments. Department-type county libraries are predominant in California, Montana and Texas but most of the other states require that county libraries be governed by administrative boards. Some of the larger, department-type public libraries are in San Diego, California; Long Beach, California; El Paso, Texas; Oklahoma City, Oklahoma; Phoenix, Arizona; and Los Angeles County, California (58).

Many librarians are skeptical of public libraries organized as departments. Some are reluctant to accept the responsibility of directing the library without the assistance and protection of an administrative board. They fear that city managers, personnel officers, and other administrators in local governments will take over some of the public library's traditional administrative prerogatives such as personnel selection and purchasing (59). There are a few cases where efficiency-oriented officers of local governments have neglected the library in favor of economy or other public services. However the trend is away from efficiency-oriented city managers and other administrative officers of local government toward public administrators with professional



educational backgrounds.

Many department-type libraries are well managed and provide imaginative programs. The better department-type libraries tend to be in council-manager cities where the city manager has taken a particular interest in developing the library (60). County, department libraries in California are also reported to provide active programs.

#### Intergovernmental Library Agencies

Library agencies serving more than one political jurisdiction have usually been developed by uniting the programs or parts of programs of two or more existing, independent public libraries. These intergovernmental libraries may be administered as joint systems, by contractual agreements, or by cooperative agreements.

Joint Systems. The most common types of joint library systems are consolidated systems and federated systems. Consolidated systems involve the centralized administration and control of a library serving two or more political jurisdictions. Consolidated systems are usually controlled by administrative boards representative of the participating units.

Consolidation of existing systems has been slow because local governments and some library administrators do not wish to forfeit local control. Also, consolidation frequently makes administrative activities more complex. In many cases consolidation requires major changes in the policies of formerly independent units. For example, an independent unit which may extend liberal lending privileges to library users may be required to restrict those privileges in order to become part of a consolidated system (61). Thus, the development of single library systems

serving several political jurisdictions has been more successful in areas where none or only a few libraries existed previously. Examples of consolidated libraries are the Public Library of Cincinnati and Hamilton County (Ohio) and the Public Library of Fort Wayne and Allen County (Indiana).

Federated libraries involve the formal association of a group of independent libraries. The principal difference between a federated system and a consolidated system is that only certain functions are centralized. Examples of centralized functions are technical processing, purchasing, and planning. Each participating unit maintains a certain amount of independent control. The amount of local control varies considerably among the existing systems. The local unit usually retains its library board, which may exercise such powers as the selection of personnel and the selection of books for the local library unit. An example is the Buffalo-Erie County Public Library which is a federation of the independent units. The participation by each unit is encouraged through the state's financial assistance program. However, the decision to take part in the program is a local option (62).

Contractual Agreements. Numerous communities receive library service by contracting with other library systems. The scope of services received by this method varies considerably. A community may obtain complete library services from another system or it may contract for only certain processing services (63).

Flexibility is an important aspect of contractual agreements. Contracts are of reasonably short duration and may be amended or even discontinued as conditions change. One of the most important applications

of contractual agreements for library service is in rapidly developing, suburban communities that are too small to develop their own libraries. Another important use of contractual agreements is in the joint purchase of expensive materials such as motion picture films. Contractual arrangements are also used in some federated public library systems.

When communities receive complete library service by contract, a major factor is the matter of representation in the library's policy-making function. Some communities obtaining service by contract appoint a local library board. Although the local board has no administrative powers, it is occasionally invited to send a non-voting representative to meetings of the larger library's board. In some cases where a municipality contracts with a county library for service, formal representation on the county board is provided for in the agreement (64).

Cooperative Agreements. Besides using formal arrangements for sharing resources, public libraries participate jointly in various activities through informal, cooperative agreements. Such agreements are generally reciprocal and involve activities such as inter-library loans, cooperative efforts in technical processing, cooperative purchasing, and group discussions on common problems. Cooperative agreements are not usually binding and do not require special organizational or legislative considerations.

#### Public Library Management

The three aspects of public library management which are important to the planner are personnel management, purchasing, and public relations. The planner should have an understanding of the problems

involved in personnel management and purchasing because these activities frequently affect the organizational structure and performance of the library. Public relations activities are particularly important because the planner may participate in the library's publicity program.

#### Personnel Management

Obtaining an adequate staff of qualified people and establishing conditions to maximize their performance are the chief concerns of personnel management. The library director is primarily responsible for personnel. However, some of the duties are often shared with the library board and the personnel officer of city or county government. In some of the larger public libraries a separate personnel officer is added to the library staff to assist the director in personnel matters (65). It has been suggested that a full-time personnel officer is justified when the library staff reaches 125 employees (66).

Most librarians prefer that the library have complete control over personnel administration and are skeptical of civil service or centralized personnel systems of the library's parent unit of government. The most frequently cited objections to centralized systems are: "(a) it restricts the geographical area from which selections are to be made; (b) its tests of competence and of personality are of dubious validity, especially for trained librarians; (c) it takes a long time to hold an examination, score the papers, and certify candidates; and (d) it tends to be inflexible in these and other ways" (67). These arguments are valid in some communities that employ civil service or centralized personnel systems. However, with the general shortage of all professional people, many communities waive the examination and

residence requirements in order to attract applicants (68).

A major problem in the development of public libraries is the recruitment of professional staff members. Qualifications are usually high, requiring a masters degree in library science. Considering the educational requirements, salaries are relatively low. Although earnings have increased considerably in recent years, the average starting salary for masters of science graduates of accredited library schools in 1962 was only \$5,661 (69). Another factor is that public libraries must compete for personnel with school, college, and special libraries which often grant more attractive working conditions and better salaries.

An example of the magnitude of the recruiting problem is that approximately 4,500 vacancies in all types of libraries existed in 1963. During the same year, only 2,140 master of science degrees were conferred of which only 1,779 were earned in schools accredited by the American Library Association. Although the number of graduates increases each year, there continues to be a wide gap between the supply of and the demand for qualified librarians (70).

#### Purchasing

Another important aspect of public library management is the method by which the library's materials and supplies are procured. Many libraries purchase some materials through the central purchasing office of the city or county government (71). A few libraries are required by law to acquire practically all materials through a central agency. Most librarians prefer to make purchases, especially books, directly. The procurement of books and other reader materials requires

special consideration because part of the value of the book collection is the speed with which new titles are added. Ideally, new books should be made available for use in the library immediately after publication. The procurement of books through the normal procedures of central purchasing is often time consuming. Also, the ordering of books does not lend itself to competitive bidding and the other procedures for purchasing standardized materials (72). However, there are numerous expensive supplies and standardized equipment which may be better and more efficiently procured through a central agency. The purchasing officer of a city or county is experienced in bidding procedures and may have more time to confer with salesmen than do members of the library staff. Hence, the use of central purchasing agencies for acquiring furniture, office equipment, and standardized supplies should prove to be effective at saving time as well as funds (73).

#### Public Relations

The library's public relations program may be viewed in two ways. In the first place the library represents a sizable investment in staff, materials, and buildings, and by bringing services to the attention of more people through publicity, the per user cost can be reduced significantly. Another way of viewing publicity is that the public has a right to know how its tax dollars are being spent (74).

In addition to favorable publicity resulting from the provision of good library services, public libraries obtain publicity by preparing newspaper articles, radio and television announcements and programs, and newsletters for direct distribution. Some public libraries prepare exhibits and displays for use in strategic locations outside the library.

Finally, guided tours complemented by explanations of materials and services are conducted in most public libraries.

The planning and directing of an active public relations program is a job of considerable magnitude. It has been suggested that a full time director of public relations is justified in public libraries serving more than 150,000 people. In smaller libraries, the responsibility for directing the publicity program is usually delegated to a staff member as an additional duty. Occasionally, smaller libraries employ a specialist on a part-time basis (75). Numerous public libraries of all sizes solicit the assistance of auxiliary groups usually called "Friends of the Library." These groups are often very influential and are especially effective in the promotion of building programs.

The library's public relations program is closely related to its planning activities. Publicity must take into consideration the strengths and weaknesses of existing library services in order to convey a realistic image of the library to the public. Also the public relations program must be based on an analysis of population characteristics, trends in library use, and other data on community conditions. The planner may make a valuable contribution to the library's public relations program by providing information on community conditions. Many of the planning agency's graphic presentations would provide excellent display materials for the library and at the same time gain a larger audience for community plans. Also, the planner may be able to point out groups which are not aware of library services.

The role of the planner in library administration is minor. Nevertheless, he may be able to make a significant contribution in liaison

activities between the library and other agencies of local government. In addition, he may provide assistance in the form of technical information. Finally, the planner must have a thorough understanding of the problems involved in library administration in order to contribute to the planning of library services and facilities.



## CHAPTER IV

### PUBLIC LIBRARY FINANCE

In order to attain the public library's objectives, sufficient income for personal services, materials, and housing must be provided. Since population and its needs for educational, informational, and recreational services have expanded at a rapid rate, the public library's requirements for funds have greatly increased in recent years. At the same time the traditional sources of revenue have been strained by the needs of all local public services. Since the needs for library services are largely intangible and difficult to express, and since the library's leadership has frequently been conservative, the library's budgets have often been slighted in favor of other public services and facilities in the community.

The planner, in order to participate in the planning of public libraries, must have an understanding of the various purposes for which library funds are expended and knowledge of the various sources of income. The planner should be able to provide technical aid in the preparation of short and long range fiscal plans. He also may be able to assist in liaison activities between the library, appropriating authorities and other public officials.

This chapter presents a discussion of the key factors concerning public library finance. These include the difficulties which libraries are encountering in obtaining adequate incomes and the various

opportunities for improving financial support for public libraries. The factors discussed are public library expenditures, sources of revenue, and administrative aspects of public library finance.

#### Public Library Expenditures

The revenue requirements of public libraries are relatively insignificant compared to the requirements of most local public services. In 1961, public libraries expended approximately \$310 million (76) compared to expenditures of \$857 million for local parks and recreation, \$1.1 billion for local fire protection, and \$16.6 billion for local public schools (77). The average per capita cost of public libraries was approximately \$1.50 (78), which is less than the cost of most magazine subscriptions and considerably less than the cost of most hardback novels. The ability of public libraries to furnish a variety of services for so few funds is an indication of the practicality of providing information, reading materials, and services through public libraries.

The cost of public library services has increased considerably since World War II, but the rate of increase has not been as great as that of most local public services. For example between 1950 and 1961, the cost of public libraries increased approximately 172 per cent (79). During the same period the cost of local parks and recreation increased 183 per cent, local fire protection increased 125 per cent, and local public schools increased 182 per cent (80).

The cost of public library service may be grouped into two major classifications -- operating expenses and capital outlays.

### Operating Expenditures

The salient factors concerning the operating expenses of public libraries are (a) the relationships between annual costs and the size of systems and (b) the distribution of costs by major budget items.

In order to provide similar levels of service, smaller public library systems usually require more funds per capita than do larger library systems (81). However, the larger systems have obtained much better financial support. In 1960, public libraries serving populations of 35,000 to 49,999 expended \$1.42 per capita compared to \$1.85 for units serving more than 100,000 people (82). Ten per cent of the public libraries, all of which served communities with populations of 35,000 or more, expended an estimated 80 to 85 per cent of all operating funds but served only 65 per cent of the people (83).

While the average expenditures for the classifications of libraries grouped by population served vary appreciably, the expenses of individual libraries vary immensely. For example, the operating expenses of individual libraries serving 35,000 to 49,999 people varied from \$.18 per capita to \$7.35 per capita in 1960 (84).

The average operating expenditures of most libraries are considerably less than the minimum requirements suggested by the American Library Association. In 1959, the Association suggested that a library serving a community of 100,000 people should budget approximately \$3.50 per capita for operating expenses. Smaller libraries should budget a higher rate and larger units may "reach minimum adequacy with somewhat less" (85). The Association's recommendations are usually considered as

rule-of-thumb guides and a certain amount of variation between suggested budgets and actual expenditures is expected. However, the actual expenditures of most public libraries are less than half the amount recommended.

The major budget items for operating expenditures are salaries, reader materials, and miscellaneous operating expenses. Staff salaries account for a major portion of the library's operating expenses and have increased more rapidly than any of the other budget items. In 1939, salaries accounted for 62.3 per cent of total operating expenditures. By 1956, salaries had increased to 67.7 per cent of the total (86). A few libraries spend more than 75 per cent of their budget for salaries. Some reasons for this trend are: (a) library programs are placing more emphasis on active programs which require a higher proportion of personal services; (b) librarians' salaries, though still relatively low, have spiraled in recent years; and (c) total financial support has often failed to keep pace with rising costs and public libraries have shifted funds from other budget items in order to retain qualified staff members (87).

Funds expended for reader materials such as books, periodicals, films, and bindings have not increased in proportion to total operating expenses. The portion of the total operating expenses allocated to reader materials declined from 22.0 per cent in 1939 to 17.8 per cent in 1956 (88). When adjustments are made for declining dollar values (1947 - 1949 base year), the per capita expenditures for reader materials actually decreased from 21.0 cents in 1955 to 20.6 cents in 1960. As a result the number of books per capita decreased from 1.30

in 1940 to 1.18 in 1963, at a time when the need for books is greater than ever (89).

In addition to salaries and reader materials, public libraries expend funds for miscellaneous items such as maintenance, rent, travel, insurance, and utilities. These items accounted for 16.0 per cent of the total budget in 1939 but accounted for only 14.5 per cent in 1956 (90). Some of the county and regional systems that serve widely dispersed populations spend considerable amounts for bookmobile operation and travel. For these systems the proportion of the budget for miscellaneous items may be in excess of 20.0 per cent (91).

#### Capital Outlays

Expenditures for non-routine items such as sites, new buildings, building additions, and furniture are generally considered to be capital outlays. A problem occasionally arises in determining what constitutes a capital outlay. Some appropriating bodies wish to classify books and other reader materials as capital outlays. However, planners and other local government officials should understand that books and reader materials are expendable items, many of which must be replaced annually. Moreover, in order to maintain a good collection of reader materials, new publications must be added periodically. Hence, reader materials are routine budget items as are salaries and other operating expenditures.

Public libraries have greatly increased capital outlays since World War II. Public libraries have expanded their facilities in both urban and rural communities and have embarked on major programs of constructing new buildings and replacing obsolete structures. Also

many communities undertook major construction programs that were postponed by material and labor shortages during World War II. In 1950, \$4.4 million or 3.8 per cent of the total expenditures for public libraries were expended for capital improvements compared with \$12.3 million or 6.7 per cent in 1956 (92). In 1960, this figure for the 822 libraries serving populations of more than 35,000 was \$34.9 million or 15.3 per cent of their total expenditures (93).

The public libraries' needs for both operating and capital expenditures will continue to increase in order to expand programs serving rapidly increasing populations, and to improve the quality of service. The needs for capital improvements are expected to continue to increase since many of the existing public library buildings are obsolete. Approximately 85 per cent of the existing library buildings were constructed prior to 1920; few of these are adaptable to modern library needs (94). In order to satisfy these needs the sources of revenue for public libraries will be burdened more than ever before.

#### Sources of Revenue

The chief source of revenue for public libraries are local taxes, state and federal aid, and gifts.

#### Local Taxes

Local governments have provided the majority of the financial support for public libraries through local taxation. The proportion of funds provided locally is approximately 88 per cent. The proportion has remained virtually constant since 1939, varying less than one per cent during this period (95). These figures are national averages and do not

reflect variations in different states. Until the past few years, local governments have obtained little financial assistance for libraries from the state and federal government.

Dependence on local taxation for a major portion of the public library's revenue has several limitations. The principal limitation is the local government's reluctance to increase taxes for fear of losing economic growth to neighboring communities. A second limitation is that most cities and counties cannot effectively impose and collect sales and income taxes and must rely on real property taxes for a major share of local revenues. However, the real estate tax has certain disadvantages. These are: (a) taxes on real property no longer reach the major sources of income since the communities' wealth is in other forms such as stocks and bonds; (b) taxes based on real estate values are relatively inflexible and do not usually expand as rapidly as the needs for public services; and (c) taxes on real property are usually limited by state laws. In a number of states the minimum and maximum tax rates for public libraries are established by the states' general library laws. The original purpose of these provisions was to guarantee a certain minimum support for public libraries. However, assessed valuation in different communities vary considerably and some communities with low evaluations are severely restricted in the amount they can legally provide for public libraries. In some states the maximum limitations were satisfactory when the law was enacted, but are currently inadequate.

Another problem of local taxation is the fact that a community's library service frequently extends beyond its legal taxing district. For example, if a community develops a good library program it will serve

residents of nearby communities who do not contribute to the library's financial support. These conditions are commonplace in metropolitan areas. Many times the existence of an exceptionally good central city library offers an excuse for suburban communities to provide only minimal library service or perhaps none at all. Most public libraries charge fees for non-resident borrower's privileges; however, these fees are seldom adequate to cover the cost of the services rendered (96). Fees are not a satisfactory source of revenue and are inconsistent with the public library's objective that "Every individual should have free library service in his local community" (97).

The public library's financial requirements are not so great that local governments can not expect to provide sufficient funds. For example, less than three per cent of the total budgets of municipalities are allocated to public libraries (98). Raising the libraries' budgets to \$3.50 per capita would require no more than six to seven per cent of most municipalities' budgets. However, city and county governments are under pressure to provide additional funds for other services and facilities and are not at liberty to divert additional portions of their revenues to public libraries.

A method for increasing the effectiveness of local financial support is the development of larger library systems or intergovernmental libraries. While the local support for intergovernmental libraries is heavily dependent on real estate taxes and is subject to legal limitations, the taxing district is expanded, making it possible for all participating governmental units to contribute toward the support of the public library as a system. Larger library systems are also capable of



operating more efficiently.

#### State and Federal Aid

State and federal governments are now participating in the financing of local libraries. The larger units of government have a greater capacity for obtaining revenue from income and sales taxes. Hence, the larger units have a broader tax base and may distribute funds to local library systems according to need and ability to provide self-support. States, recognizing the need for certain reforms in public libraries such as the formation of larger systems and the employment of qualified personnel, encourage these reforms through their aid programs.

State Aid Programs. Some of the states provided financial assistance to local libraries during the 1930's but only in token amounts. As late as 1950, state grants accounted for less than two per cent of the total library funds provided. In 1956, there were aid programs in 25 states, with grants totaling almost \$5.0 million or 2.7 per cent of the total financial support for all public libraries. State financial assistance to public libraries varies considerably from state to state. New York and Georgia, providing approximately \$2.047 million and \$0.839 million respectively, accounted for almost two-thirds of the total state grants in 1956. In Georgia it amounts to approximately one-third of the total public library funds, compared to 2.7 per cent in New York and 0.2 per cent in New Hampshire (99). By 1961, the number of states providing financial aid to local libraries had increased to 27 and total state grants amounted to \$17 million (100).

Most state financial assistance must be used for salaries and reader materials. Some states make grants in the form of materials and

direct payment of salaries. While some states have proposed grants for library buildings, no state has enacted a construction aid program (101).

A major consideration to local public libraries is the terms under which state grants are made. The formulas for state aid are complex, being somewhat similar to minimum foundation programs for education. In general the programs are set up to encourage increased local financial support, to encourage larger systems both in area and in population served, to encourage the employment of qualified personnel by establishing librarian certification, and to encourage certain minimum standards of library service. For example, the New York assistance programs provide aid to approved library systems in the form of grants based on the number of counties served, on the population served, and on the area of land in the system. Grants are made to establish systems and to provide books and materials for the initial stocking of new libraries. In order to qualify for aid a library system must serve at least 200,000 people or an area of 4,000 square miles, meet certain requirements regarding the number and qualifications of personnel, and meet certain standards related to materials (102).

Some writers have proposed that 20 to 40 per cent of the public library's budget should be provided by the states (103). No one formula will suffice for every case. The funds should be sufficient to assure that all library systems have enough income to provide adequate services. Enough financial assistance should be provided to make the proposed reforms attractive but not so much as to destroy the incentive of local government to provide its own share of funds.

States provide assistance to local libraries in ways other than direct, fiscal grants-in-aid. Each state through its public library extension agency provides some type of service assistance to local public libraries. Most state agencies reinforce public library service programs through the provision of library materials for interlibrary loans and the provision of reference services. Most of the state agencies provide consultative and promotional services such as workshops, in service training programs, and advisory services on library planning, personnel administration, finance, legislation, and other aspects of library administration. Finally, state library extension agencies administer federal aid programs within each state (104).

Federal Aid Programs. The federal government provides financial assistance to local libraries through the Library Services Act and the Accelerated Public Works Program. The Library Services Act makes funds available for both operating and capital needs. The Accelerated Public Works Program provides funds for library buildings under certain circumstances.

The Library Services Act, approved in 1956, authorized up to \$7.5 million per year for local public library services. The Act was originally written as a five year program to terminate in 1961, but it was amended in 1960 to extend the program through 1966. The Act was amended again in 1964, increasing annual appropriations to \$45 million (105).

The original act and the 1960 amendment were designed to provide financial assistance for public library service in rural areas where service was not available or was inadequate. The 1964 amendment makes funds available for library services in all communities that meet certain

requirements. The Library Services Act requires that a state agency administer the program within each state. The initiative for planning and developing library services through the use of federal funds is clearly placed with the state agency and local governments. The state agency develops and submits a proposed plan for library service to the U. S. Office of Education. Upon approval of the proposed plan the state agency receives federal funds for its program.

The 1964 amendment to the Library Services Act permits the use of federal funds for both operating and capital expenditures. Prior to 1964, only operating expenditures were authorized. The Act has been broadly interpreted and funds have been approved for activities such as local library service programs, research, scholarships, seminars, and public information programs. Funds may be expended by both the state agency and local library systems for salaries, library materials, travel and other operating expenses. The 1964 amendment permits expenditures for construction.

For any program which qualifies under the Act, federal funds may be obtained to cover from one-third to two-thirds the total cost of the program, depending upon the ratio of the state's per capita income to the average per capita income of the United States. The local share of a program may be provided by the state, by the local government or by both.

Federal aid for public library services has amounted to a relatively small portion of the total expenditures for library services. In 1961, federal payments were approximately \$7.5 million or less than 2.5 per cent of all public library expenditures. However, the use of

federal funds has been concentrated in the development of rural library service programs and state extension agencies. Therefore, federal participation has amounted to approximately one-third of the total cost of programs assisted by the Library Services Act (106).

The Library Services Act has made very important contributions to (a) the development of state library extension agencies and (b) the provision of library services in rural areas. While all the states except Utah had library extension agencies prior to the passage of the Library Services Act, many of the agencies had limited programs. The availability of federal funds has encouraged all states and a few of the outlying territories to develop new programs and expand existing activities. Numerous state agencies are now sponsoring research projects and surveys, making consultative services available to local libraries, participating in scholarships and training programs for library employees, and carrying out active public information programs. While these expanded activities have been oriented to the promotion and development of library services in rural areas, the programs have provided marginal benefits to library services in all areas. Since the 1964 amendment removes the rural limitation the state agencies' activities are expected to increase even more.

Many rural communities have used federal financial assistance to initiate new library programs or improve existing services. As of 1961, Federal assistance had been used for partial support of systems serving 32 million people. In these programs the federal share ranged from approximately one-fourth, to two-thirds of the total expenditures; state and local governments provided the balance. State and local

governments have used the funds effectively to create large rural systems or to extend services of existing urban systems into rural areas (107).

Federal assistance to local libraries is attractive because state and local governments are given considerable latitude in initiating and administering programs financed by the Act. With the increased appropriations provided for in the 1964 amendment to the Library Services Act, more library systems will be able to complement local sources of revenue with federal funds.

The Accelerated Public Works Program makes grants available for public library buildings under certain conditions. Grants may be obtained to cover up to 50 per cent of the construction cost. However, the project must be located in an area of substantial unemployment as designated by the Secretary of Labor or in a redevelopment area as designated by the Secretary of Commerce. The program is administered by the Housing and Home Finance Agency (108).

The application of this program has been limited to a few geographic areas. However, 20 library projects, totaling approximately \$2.37 million, were approved during the first six months of the program's existence. During the same period, 24 additional projects, totaling \$2.6 million, were considered (109).

#### Gifts

Gifts in the form of cash, property, income from endowments, and funds raised by clubs and civic organizations provide a significant portion of the income for public libraries. Altogether, gifts constitute about 10 per cent of the total revenue for public libraries; the

proportion varies sharply among the different states. In 1956, 52.7 per cent of the support for public libraries in Rhode Island came from gifts as compared to 3.2 per cent in Georgia (110). While gifts are an important source of revenue for many libraries their importance has been declining over the years. In 1939, the proportion of total public library income derived from gifts was 11.3 per cent compared to 10.0 per cent in 1956 (111). Since income tax laws do not favor private gifts to public libraries and since emphasis is being placed on greater financial support from all levels of government, income from gifts will probably continue to decline in relative importance.

Gifts should not be considered as substitutes for adequate public support. Too often, a generous gift offers an excuse to reduce public financial support. Gifts should be used for special programs which are in addition to normal library services. Potential donors are much more likely to contribute if they can be assured their funds will be used for special programs rather than being substituted for public support (112).

Some donors place rigid restrictions on the use of their contributions. Examples are contributions in the form of real estate which can only be used for a library building site or funds designated for use in activities which are contrary to library policy. Certain limitations are to be expected. However, the library should carefully consider the future effects of such restrictions. Gifts should not be accepted if the donor places restrictions that are inconsistent with library policies.

### Administrative Aspects of Public Library Finance

The complexity of library finance requires special procedures. The preparation of budgets, the purchasing of equipment and materials, the accounting for and control of expenditures, and the planning for both short and long range revenues and expenditures requires special methods and skills. These activities are expected to become more complex with the trend to larger library systems and participation by all levels of government.

The library director bears the bulk of the responsibility for the library's fiscal administration. In some cases finance officers of the parent unit of local government share this responsibility. Library boards frequently participate in the preparation of budgets but the primary role of the board is to review the budget and promote better financial support. Approximately one-fourth of the public libraries employ a full time business manager to assist the director in fiscal administration. Frequently the business manager is not a librarian but a specialist in fiscal management (113). Some librarians are opposed to the employment of business managers who have had no prior experience as librarians, indicating that outsiders are not likely to have a clear understanding of library work (114). However, with the general shortage of qualified librarians the use of a specialist as an aid to the director may be justified.

An important activity of fiscal administration is the preparation of the annual budget. The budget is a one-year plan of activities and should reflect the findings and proposals of the library's planning program. Most libraries continue to use the item-type budget which lists



the library's proposed expenditures in terms of salaries, books, binding, utilities, and other operating expenses. This type of budget usually indicates the past expenditures for each item and occasionally the accomplishments of past programs. However, the item budget frequently does not indicate the cost of individual library programs such as reference services and circulation services. A few libraries use performance-type budgets which classify past and proposed expenditures by programs. Performance budgets more clearly indicate the cost of the various activities of the library and may be more successful in justifying the library's financial needs to appropriating bodies. The preparation of the performance budget may require more time and effort since more data are necessary and more detailed accounting procedures are required. However, since the preparation of this type of budget requires considerable prior planning, efficiencies may be attained in executing programs. The preparation of each type of budget is a complex undertaking and the library frequently needs technical assistance (115).

In addition to the annual budget the library should develop long range financing plans for both operating and capital expenditures. The planning period for long range fiscal plans is generally considered to be five or six years. While it is important to plan for longer periods, the accurate estimation of expenditures and revenues beyond six years is very difficult during this dynamic era.

In developing a long range operating budget, special attention should be given to the establishment of a new branch library or the initiation of a new program of service. A new branch library or a new service such as an audio visual program will require additional operating

income during the first few years since staff must be recruited and reader materials must be added in a relatively short period of time. This addition of new programs or the establishment of new branches must be scheduled in relation to the availability of funds. The programming of new activities must take into consideration the various activities of the library and proposed improvements of other public services in the community. Since the public library obtains a major share of its funds from the same source as do other public services in the community, the library's long range operating budget must be coordinated with the fiscal plans of other services.

In a similar fashion, the library should develop a long range capital improvement program. The purchase of a new site and construction of a building require a large, lump sum payment. In most cases a bond issue is necessary since these payments are frequently too large to be absorbed in operating budgets. The programming of improvements financed by bonds is somewhat different from the scheduling of cash operating expenditures. The objective of programming operating expenditures over a period of years is to avoid excessive, cash encumbrances in a single year. However, the objective of programming improvements that require bonds is frequently to schedule a number of improvements within a relatively short period of time. Including several improvement projects in one bond issue is usually more efficient to administer. For example, the administrative costs of a single, one million dollar bond issue are much less than the costs of four, \$250,000 issues. The margin of difference may be very large when referendums are required for each bond issue. Hence, the library's capital

improvements, which are usually small compared to school buildings, sewers, and other community improvements should be coordinated with other major public improvements.

The planner may assume an important role in the financing of public libraries. While not an expert in fiscal matters, he can be of significant value in helping the library director establish the need for library income and in assigning priorities to library programs in light of overall community programs. As discussed in Chapter II the planner may assist in the planning of the library service programs by providing information on community conditions and evaluating the effects of community development on library services. Pertinent information may further be used as justification of the proposed annual and long range library budgets. The planner may also assist the library director by providing information on the proposed programs and capital improvements of other public service agencies. The public library's fiscal plans are likely to be much more realistic and acceptable to appropriating bodies if they are related to the plans for other community services.

After the library's annual and long range budgets have been prepared and submitted to the finance officer, or other designated official of the appropriating authority, the planner is frequently asked to make recommendations concerning priorities. In order to perform this task satisfactorily, the planner must be familiar with the peculiarities of the proposed programs of all public service agencies. In evaluating the public library's proposals, the planner should consider the need for library service in terms of programs and financial requirements, the co-ordination of the library's public service program with its proposed

capital improvements program, the co-ordination of the library's fiscal plans with those of other public services, the possibilities of obtaining financial assistance from outside sources, and the limitation of local sources of revenue.

While the public library's need for funds is relatively insignificant compared to that of other public services, this need is increasingly important in the present, education and information conscious society. The attainment of adequate financial support will depend on how well the people and their elected officials understand the value of good public library services. The bulk of the responsibility for demonstrating this value is borne by the library's lay and professional leadership. However, the planner, in his unique position as a staff officer of local government, may aid significantly in relating the needs for library service to local social and economic conditions and in correlating the financial requirement of library programs with the requirements of other public services in the community.

## CHAPTER V

### PUBLIC LIBRARY BUILDINGS

The primary purpose of public library buildings is to provide a place from which library services can be provided. The location, size, and architectural considerations must be directed by the objectives and plans for public library services. This chapter deals with the location requirements of, characteristics of, and planning for public library buildings.

#### Location Requirements of Public Library Buildings

Because of its influence on the success of a program, the location of a public library building merits special attention. In order for the public library to fulfill its objectives of facilitating public education, information, and recreation, its building or complex of buildings must be located where library services are conveniently accessible to the maximum number of people. Time is valuable to most people and unless the library is conveniently located, many citizens may not be able to enjoy the benefits of library services. The library has a sizable investment in staff and materials and the per user cost may be greatly reduced if the library building is located so that services are made conveniently available to the greatest number of people. Furthermore, a site and a new library building represents a long-term investment, and once constructed, the building is likely to remain a service point for many years to come.

Policies, plans, and decisions regarding the location of library buildings must be conditioned by the objectives and plans for library services. The need for library buildings, their location in the community, and the timing of construction should be based on the need for library services, the relative adequacy of existing services, and the ability of the library to staff and stock new facilities. The availability of low cost sites or pressures from groups in the community should be considered in locating a library building only if they are consistent with the library's policies and plans for service programs.

Current trends in community development such as decentralization and increased use of automobiles have affected library location requirements considerably. Suburban branches of public libraries are becoming increasingly important, especially in circulation services. Central libraries have also increased in importance, particularly since heavy emphasis is being placed on the reference, research, and information functions. Centrally located space for readers, staff, and a large book collection are essential to the provision of these services.

#### General Requirements for Library Location

Making library services available to the public is similar to the merchandising of retail goods and services. Therefore, a positive approach to selecting good sites for library buildings is similar to the selection of good retail locations. Five general requirements for library locations are: nearness to traffic generators; compatibility; accessibility; stability; and site economics.

Nearness to Traffic Generators. The public library is not a primary attractor of people. While students requiring information for

school assignments may use the library no matter where it is located, the majority of the library's users combine a trip to the library with other errands (116). As an attractor of people the public library is very similar to a number of retail businesses such as apparel shops, shoe stores, and variety stores. Only a small portion of the business attained by these shops and stores is self-generated; therefore, they must seek an interceptor location near primary destinations of shoppers and workers such as department stores and office buildings. The public library would do well to place its buildings in similar interceptor locations (117).

Compatibility. The public library should locate near compatible neighbors. Compatible neighbors are those which increase each others patronage because they conduct closely related activities. For example a drug store is highly compatible with a medical clinic, and in contrast, a used car agency is highly incompatible with a department store. Nelson, a prominent retail location consultant, has classified most retail and service activities according to relative compatibility. He does not rate public libraries but he does rate book stores. Assuming book stores and libraries serve a similar clientele, most retail businesses would be compatible with public libraries. The principal exceptions are drive-in eating establishments, automobile dealers, auto repair shops, service stations, and mortuaries (118). Some of the retail and service activities which may be highly compatible with public libraries are book stores, music shops, professional offices, and banks. Theaters and restaurants may also be highly compatible with libraries especially during the evening hours.

Accessibility. A third general principle of library location is that the library building should be easily accessible. The accessibility requirements of public libraries may vary slightly in different communities and in different parts of a given community since the modes of transportation vary in importance. For example, Cleveland, Ohio; New York City, New York; Philadelphia, Pennsylvania; and Chicago, Illinois depend heavily on mass transit facilities. In these and other cities with similar facilities, the location of existing and proposed transit stations and bus stops would be important factors with reference to an accessible location for public library buildings. Other cities such as Los Angeles, California; Houston, Texas; Miami, Florida; and most smaller cities depend on automobiles for transportation. In these cities, the location of the library should be oriented to easy access from major thoroughfares and parking facilities. In most communities the ideal location for a public library is at an interceptor position between the major transportation facility -- whether it be a transit station or a parking facility -- and the primary destinations of shoppers and workers.

Stability. A Library site should be located near primary generators of traffic that are growing and not susceptible to relocation during the economic life of the proposed library building. The service area of a proposed branch library should be expected to increase in population and potential library users.

Site Economics. Good public library sites are likely to be very expensive. The library's investment in land may be as high as one-half the cost of the library building (119) compared to approximately 15 to 30 per cent for office buildings and approximately 5 to 15 per cent for



shopping centers (120). The high cost of good library sites suggests two alternatives in obtaining prime space for the public library. One alternative is for the library to construct a multi-story, dual purpose building large enough to justify the cost of the site, using the lower floors for the public library and leasing the remaining floors for office space or other compatible activities. Such a building would require imaginative architectural treatment to design a building that would be practical for the library and for office space. In order not to detract from the provision of library services, imaginative building management would be required to avoid burdening the library with details of renting space, maintenance, and rent collection. Perhaps the management of the office space could be handled by a real estate management firm. Should the upper floors be provided for governmental offices, the management of the building could be transferred to a separate governmental agency.

A second alternative would be to lease prime space in a privately owned, dual purpose building thus avoiding the large initial investment and the problems of building management. Such space can be designed according to the library's specifications. Most retail businesses use this approach. The Federal government also rents a large portion of its space for Post Offices, and local offices of federal agencies.

#### Special Requirements for Central Libraries

In addition to meeting the general requirements discussed above, the central library building has specific requirements which are related to the unique services provided. Most library systems centralize most of their reference and information services in the central library

building. As discussed in Chapter II, special staff and a large centralized collection of library materials are essential to good reference services. Most central libraries make available extensive circulation collections (a) to support reference services with circulating, non-fiction books, (b) to serve the surrounding resident population, (c) to serve the transient population such as shoppers and workers, and (d) to support branch libraries in the system with inter-library loans. Finally central libraries generally provide space for administrative offices and certain processing operations. There have been a few attempts to decentralize some of these functions in efforts to locate some of the activities on less expensive sites. Examples are Philadelphia, Pennsylvania, and Memphis, Tennessee, which located most of these activities on a site outside the central business district and provided a downtown branch. These attempts have, for the most part, been unsuccessful because the separation of activities has weakened the quality of library services and has increased administrative costs (121). Some very large library systems duplicate certain specialized functions of the central library in large, outlying branches in order to make special services more convenient to remote locations. However, this does not remove the need for centralizing the major portion of the reference information and circulation services. An important factor concerning the specific location of the main library within the central business district is the proximity of the library to the users of special services for business and industry.

#### Special Requirements for Branch Libraries

Branches are employed in larger library systems to distribute

services to outlying districts. Small independent libraries affiliated with a federated system serve similar purposes and have similar locational requirements.

The appropriate location of branch library buildings is closely related to the size and spacing of branches. In the earlier stages of the public library's development, small branches, like small grocery stores, were spotted at fairly frequent intervals. The present thinking of most librarians is that there should be fewer but larger branch libraries. With the development of modern transportation facilities, branch libraries may conveniently serve a much larger area, and by centralizing staff and materials in larger facilities, services of a higher quality may be provided. Service to remote parts of the service area may be provided by bookmobiles.

In addition to the general requirements for library locations, there are other factors which are particularly important in selecting sites for branch libraries. The factors are: functions of the branch libraries; characteristics of population; flexibility; and barriers.

Functions of Branch Libraries. The function of different branch libraries may vary considerably. A few large branches in major metropolitan areas provide extensive circulation, reference, and special services. These units, sometimes called "regional branches," frequently take on some of the central library's functions such as the direction and supervision of nearby, smaller branches and the provision of a large book collection for interlibrary loans to nearby branches. The service area of these large branches may encompass several smaller branch libraries and may include 300,000 to 600,000 people (122). Some of the large

branches are comparable in function and size to the central libraries in Atlanta, Georgia; Tampa, Florida; and Rochester, New York. Application of regional-type branches is limited to a few metropolitan centers where the library system is so large in area and in population that some of the functions of the central library must be duplicated in some of the more remote segments of the metropolitan area. The appropriate location of a regional branch must be conveniently accessible to the large segment of the metropolitan area it serves and to the smaller branches it supports. If the regional branch's function includes the distribution of inter-library loans to nearby, smaller branches, there must be loading facilities as well as parking, so that access by individual users is not impaired.

The functions of most branch libraries are limited compared to those of "regional branches." The services provided are usually conditioned by the particular demographic characteristics of the branch's immediate service area. The program of the branch is usually oriented to the nearby resident population and includes as a minimum, circulation service and a few standard reference materials. Depending on need, the branches' programs may be greatly expanded to include such activities as group services, special reference services, and bookmobile programs.

The function of branch libraries greatly affects their minimum size and spacing. The minimum size of branch libraries should be based on an expected minimum annual circulation of 75,000 to 100,000 volumes. A branch library of this size would require a staff of five or six full time employees, a book stock of approximately 25,000 volumes and approximately 8,000 square feet of floor space. Smaller branches are not usually

feasible because they cannot provide quality services. In low density areas branches of this size must be spaced several miles apart. Service to intermediate points may be provided by bookmobiles (124).

Characteristics of Population. The composition and density of population in various districts of the community influence the demand for library service, and thereby affect the optimum spacing of branches. Circulation per capita may be as high as ten or more volumes per year in a district where the level of educational attainment and family income is high. In other districts where the level of educational attainment and family income is substantially lower than average, circulation per capita may be as low as one volume per year. Hence some low income districts, which have no less need for educational services, do not place high demands for library services. In light of the needs for library services by low income families, the public library may wish to seek a compromise location for some branches so that a given service outlet is convenient to both higher and lower income districts. Such compromise should not, however, overlook the five previously discussed general requirements of library location.

In addition to the local resident population some branches serve transients such as employees and shoppers from other parts of the community. Hence, attention should be given to places of employment and other activities which attract people from other portions of the community.

Population density is related to the optimum spacing of branch libraries. Each branch should be convenient to the population within its service area. However, each branch's service area must include

enough population to justify the investment in staff, materials, and facilities necessary to provide quality services. Thus, densely developed communities may justify closely spaced branches with small service areas. The spacing and service areas of branches in low density communities should be greater. A study for Milwaukee, Wisconsin recommended that branch libraries be located within five minutes driving time (non rush hour) of each resident. Five minutes driving time amounts to approximately 1.5 to 2.5 miles. This criterion was very satisfactory for the close-in areas of Milwaukee. The population density in most parts of the city was high enough that at least 47,000 people lived within five minutes of each branch (124). In the fringe areas of many communities five minutes travel time may be insufficient. Assuming suburban traffic conditions, a five minute travel time would provide for a service area of approximately 16 square miles. If the density of the service area is 3.0 perhaps per gross acre, the population served would be only 30,000 people which is barely sufficient to support a branch library unless the level of education and income is above average. A study for Dallas, Texas recommended that the maximum travel time to branch libraries be 10 to 15 minutes (125). Each community should develop its own standards regarding the spacing of libraries by studying the distribution of population. The branch's service area should include sufficient population to justify the minimum staff and materials requirement stated above. Branches spaced at intervals of more than two or three miles may compensate for the slight inconveniences to some users by providing higher quality services and by employing bookmobiles for service to remote areas.

Flexibility. No matter how well the system of branches is planned, some locations may become ineffective. Most cities are currently experiencing major shifts in population and changing patterns of land use. With emphasis being placed on improved transportation systems and urban redevelopment the trend will continue. Hence, some branch locations may become obsolete in time and consideration should be given to minimizing the difficulties of shifting branch locations in the future. An important consideration is that the branch building need not be elaborate and costly. Should it become necessary to shift to a new location at a future date, the undepreciated value of the building would be less. The Queens Borough Public Library constructs branch buildings that can easily be converted into other uses if the location becomes obsolete for library purposes (126). Another consideration is that branch libraries may be placed in rented space. Using rental space, the public library branch may be relatively free to relocate at a future date and at the same time avoid a large initial investment.

Barriers. In selecting good branch library locations attention should be given to physical and psychological barriers which may discourage patronage. Streams, rough terrain, and heavy industrial traffic are important considerations. The existence of other branch libraries usually limits the effective service area. Finally, political boundaries frequently affect the location of branch libraries. Many public library systems have not employed intergovernmental agreements or other administrative solutions for the provision of unified library services across political boundaries. Hence, a municipal system which is considering the

establishment of a new branch near corporate boundaries must consider the effects of future annexation programs and the adjacent library system's plans for branch libraries.

Locating public libraries in civic and cultural centers, parks, and schools has proved to be unsatisfactory because these sites are seldom near major attractors of people. Using the criterion of "geographic center of population" without regard to other principles of library location is invalid.

#### Characteristics of Public Library Buildings

While the planner does not usually become involved in the detailed plans of public buildings, he should have an understanding of the major factors regarding the public library's functional needs for space and the alternate methods of providing library buildings. These factors apply to both central and branch libraries.

#### Functional Needs for Space

The important factors regarding the public library's space needs are: the amount of space required and architectural requirements. The public library building should be adequate to provide space for basic requirements -- readers, reader materials, employees, and mechanical equipment. Auditoriums and club rooms are not normally required for basic library services. Before including auditoriums and club rooms as part of the total space requirements of the public library building, consideration should be given to the amount of use a library auditorium will receive and the availability of other auditorium facilities in the community. Renting space for periodic activities may be a much more



satisfactory solution than providing the initial capital investment and annual maintenance cost for a seldom used facility (127).

In developing plans for public libraries it is essential to obtain an approximation of the gross space requirements in order to provide guide lines for site selection and long range fiscal plans. Basic requirements for space are related to the number of people in the library building's service area, the social and economic characteristics of those persons, and the library's objectives and policies regarding service programs. Experience formulas relating the building size to population served are satisfactory for approximating the gross floor area needed in library buildings (128). In making more accurate estimates, calculations based on experience formulas should be compared with the gross dimensions for recent buildings in other communities. The social and economic characteristics of the service area population may provide justification for modifying the building space estimate calculated by experience formulas. As mentioned previously, populations with a higher level of educational attainment and family income may make significantly higher demands for library services. The objectives and policies of the public library, which take into consideration the need for library services and the community's ability to provide funds, may also alter the requirement standards for building space. However, a building of less than 8,000 square feet is not generally recommended because lesser space is not sufficient for an adequate library service outlet (129).

While sufficient space is necessary to carry on an effective library program, the amount of space should be brought into balance

with the public library's capability to use the space efficaciously. Infrequently an over zealous building program detracts from the library's service program. Unused space is expensive initially and requires unnecessary annual maintenance costs.

Architectural requirements of modern public library buildings are somewhat similar to those of retail stores. Modern library buildings frequently have sidewalk-level entrances, large show windows, and most of their major activities on the ground floor. Permanent-load bearing partitions are avoided so that internal service areas may be supervised easily and rearranged as conditions change. Ideally the building is designed so that useful additions may be made economically. The building's appearance, both internally and externally, is pleasing and inviting. The building is well lighted and attention is given to reducing noise. Good heating equipment is necessary and air-conditioning is desirable (130). Ideally consideration is given to the potential re-use of the building should relocation of the library become necessary.

#### Alternate Methods for Providing Public Library Buildings

When additional space is required for a public library's operation two and sometimes three alternatives are available. These are: remodeling; new construction; and renting.

Remodeling. The public library may consider remodeling an existing library building or a commercial structure when modernizing or additional space is desired. The important factors to be considered in remodeling projects are location, adaptability of space, structural requirements, and cost. A primary consideration in remodeling projects is that the building be properly located from a library service stand-

point. Even structurally sound buildings that require minimal improvements are a poor investment risk if improperly located. A second requirement is that the amount of space be adequate and adaptable for library purposes. Sufficient space should be available on the ground floor for most of the library's major activities. Internal partitions should be removable so that internal service areas may be arranged for efficiency and ease of supervision. Structural soundness should be investigated since book stacks create heavy loading requirements (131). Finally, the cost of remodeling may be the most critical factor. A remodeled building usually has a short economic life compared to a new structure. Maintenance and utility cost are usually high in reconditioned buildings. When an existing library is being remodeled, expenses are often incurred for renting temporary quarters and moving. Therefore, the total capital cost amortized over the relatively short economic life plus the additional cost for maintenance and utilities may be sufficient to justify a new building or the renting of prime space.

New Construction. When additional space or more modern and efficient facilities are needed, most librarians prefer to construct new public library buildings. The construction of a new building presents an opportunity to incorporate the desirable elements of modern library architecture. New and more efficient materials and equipment such as curtain walls, air-conditioning, and efficient lighting fixtures can be used in new buildings. Also, new buildings are usually easier and less costly to maintain.

However, the public's investment in library buildings must also be considered. The initial investment in a new library building may be

considerable, particularly if an additional site is required. Construction cost of public library buildings may vary between \$12.00 to \$30.00 per square foot depending on the building's luxuriousness and size, and on local conditions with respect to labor and materials (132). A minimum size branch requiring 8,000 square feet of floor space would cost at least \$96,000. Adding approximately one-third for the site the total investment for a minimum size library building would be approximately \$128,000. Assuming the service area includes 30,000 people, the initial cost would be \$4.25 per capita which is usually more than the annual operating expense. Amortizing the \$96,000 over 30 years at 5.0 per cent interest the annual cost would be approximately \$6,200. However, should the building become obsolete in 10 years as a result of population shifts or other changes, the annual amortization cost would be approximately \$11,750. These calculations do not include figures for ground rent or payments in lieu of taxes. Hence, the construction of a new library building must be based on a thorough study of the need for space, the ability to provide funds for both the initial cost and operating expenses, and particularly the location.

Renting. Public libraries infrequently utilize rental space for their activities. Usually, rental space is utilized for temporary quarters until funds can be provided for a new building. However, several factors indicate that considerable attention should be given to renting space for the public library's activities. A principal consideration is that the public library's chief objective is the provision of services. Thus, the library must allocate its financial resources accordingly. Long term investments in real estate, even with good counseling and

prior planning, involve some risk. Many retail establishments such as supermarket chains, variety stores, and apparel chains, recognizing the risks involved, prefer to rent prime space and allocate their would be capital investment to the extension and improvement of services. A similar policy of concentrating financial resources in service programs should be considered by public libraries, particularly in the present era of rapid urban development and change. Major population shifts and rerouted transportation facilities may make good existing library locations obsolete. Several cities such as San Francisco and Atlanta are planning modern rapid transit facilities which may alter travel and land use patterns significantly. Urban redevelopment programs are also affecting land use patterns and the distribution of population. While local governments are making significant gains in guiding and controlling growth, the long range stability of many segments of rapidly developing communities is uncertain.

Of particular importance to the provision of space for branch libraries is the emphasis being placed on shopping centers. In outlying districts, there are few suitable locations for branch libraries other than in shopping centers. Even a site adjacent to a shopping center is not particularly suitable with respect to pedestrian access since most centers are surrounded by parking lots.

The Vancouver Public Library rents approximately 6,000 square feet of floor space in a shopping center for a branch library at an annual rent of approximately \$9,000. This branch has been very successful, lending approximately 360,000 volumes per year (133). According to estimates obtained for this study, space in a prosperous shopping

center costs between \$1.50 and \$2.50 per square foot per year. Some developers may consider the library an asset to the center and reduce the rent accordingly (134).

#### Planning for Public Library Buildings

A thorough and continuous planning program for public library services, which was discussed in Chapter II, is an essential prerequisite to the development of plans for public library buildings. The need for library buildings, the purposes for which they must be designed, their size, and their location are all dependent on the plans and policies regarding library service.

As in the planning of services, a number of participants are needed for the planning of buildings. The participants may include the library director, the planner, a library consultant, a lay committee, and an architect. The bulk of the responsibility for guiding the planning activities lies with the library director. The city planner's understanding of urban development and his resources of information may be of significant value to the planning of the library's physical facilities. The services of a library consultant are important in obtaining an objective view point particularly if the director or the architect has had limited experience with library building projects. Lay judgment is usually sought from the library board or a specially appointed committee. The architect has a key role in designing the building and inspecting the construction. His services may be used to greater advantage if he is supplied with adequate information concerning space requirements, functional requirements, and budgets.

In developing plans for the library's physical facilities, the planner may be able to contribute significantly in evaluating the community's needs for public library buildings, selecting locations for public library buildings, and evaluating plans for library buildings.

#### Evaluating the Community's Needs for Public Library Buildings

The planner may assist in evaluating the community's needs for public library buildings by developing standards for library buildings and analyzing the performance of existing buildings.

Developing Standards for Library Buildings. In order to evaluate the effectiveness of existing library buildings and to prepare plans for additional facilities, the public library should develop general policies regarding size and location of library buildings. The planner's task is to provide the facts on which the policies may be based. While national standards and experience formulas are helpful, many communities have some unique characteristics. Therefore, each library system may wish to develop its own criteria for size and location of library buildings.

In developing criteria for the size and distribution of library buildings the planning agency should study the objectives of library services, the community's policies regarding urban development, the composition and distribution of population, the pattern of land use, and the existing and proposed transportation network. A thorough study of local standards for branch library buildings was conducted by the Department of City Development and the Milwaukee Public Library (Milwaukee, Wisconsin). The study proposed criteria regarding optimum service area population, optimum spacing, access by automobiles and mass transit,

location with respect to traffic generators and compatible neighbors, optimum site size, parking requirements, landscaping, minimum and optimum building size, and general architectural requirements for library buildings (135). Similar studies have been conducted in St. Petersburg, Florida (136); Roanoke, Virginia (137); Phoenix, Arizona (138); and Nashville, Tennessee (139).

Analyzing the Performance of Existing Library Buildings. Only the library director or a library consultant can evaluate the performance of a library building with respect to the amount and arrangement of space. The planner, may, however, be of significant assistance in analyzing the effectiveness of the building with respect to location. An important task is to determine the service area and number of persons served from each library building. A study for Milwaukee used driving time as the criteria for determining the effective service area of branch libraries and used data on resident population to determine the number of people served (140). To obtain more accurate data, consideration should be given to interviewing a small sample of library users to determine their residence and their reasons for frequenting the library (e.g. near place of employment, shopping, or recreation facilities). With increased mobility, other factors may be more important than convenience to place of residence.

Knowing the service area population of each library building the planning agency may assist in analyzing the relative effectiveness of the building's location with respect to the provision of library services. Total circulation per capita and cost per volume circulated are excellent indicators of the performance of most branch libraries. In order to



present more accurate data, circulation figures should be classified into adult fiction, adult non-fiction, juvenile fiction, and juvenile non-fiction. If these sub-classifications are used, the service area population should be divided into adult and juvenile age groups according to the library's definitions. Performance figures such as cost per volume circulated usually indicates the relative effectiveness of the building's location. An excellent study of existing building performance was conducted for Arlington County, Virginia in 1956 (141).

#### Selecting Locations for Public Library Buildings

An analysis of the public library's plans for service programs, standards for library buildings, and the adequacy of existing buildings may suggest a number of locations for additional library buildings. Thus, selecting the most appropriate site for a particular building may become a process of elimination.

A practical method for selecting the most appropriate site is to rank each alternative according to location requirements. A technique for this procedure is illustrated in Table 1. In the illustrative example, sites "A" and "C" have the greatest potential. The Dayton, Ohio City Plan Board used this approach for selecting library sites in 1961 (142).

#### Evaluating Plans for Public Library Buildings

Local planning agencies usually have the responsibility for reviewing plans for all public improvements. The planner is frequently directed to make recommendations concerning the conformity of proposed public improvements with the overall objectives of the community. In assisting in the selection of good locations, the planner has an opportunity

to relate the library's plans to the overall development plans of the community.

An adequate public library is a valuable asset to an active and progressive community. While the attainment of good libraries is the responsibility of the library director, services and facilities may be greatly enhanced if the director and the planner cooperate in developing plans for the improvement of library programs. If the library is developed according to the guidelines set out in this study, library services and facilities may be attained which are suited to the social and economic needs of the community.

Table 1. Rating Alternate Public Library Sites

<u>Location Requirements</u>	<u>Site A</u>	<u>Site B</u>	<u>Site C</u>	<u>Site D</u>
Nearness to Traffic Generators	1	2	3	4
Compatibility of Neighbors	2	3	4	1
Accessibility - Automobile	3	4	1	2
Accessibility - Transit	2	4	3	1
Accessibility - Pedestrian	1	2	3	4
Stability of District	2	4	1	3
Cost	4	2	3	4
Other Special Requirements	<u>1</u>	<u>3</u>	<u>2</u>	<u>4</u>
Total	16	24	15	21

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